**Defense Finance and Accounting Service**

**Email Message Management/Customer Contact System Statement of Work**

October 12 ~~Aug 9~~, 2000

**1.0     Background**

The Defense Finance and Accounting Service (DFAS) serves as the primary finance and accounting agency for the Department of Defense (DoD).  DFAS is currently pursuing an effort to manage and consolidate the myriad of financial and accounting systems from the military departments and defense agencies in order to achieve an efficient Federal Financial Management Improvement Act (FFMIA) compliant environment.  The systems integration strategy to achieve FFMIA-compliant financial and accounting systems will be part of the Defense Information Infrastructure and will be known as the DFAS Corporate Information Infrastructure (DCII).  All the components will be integrated – along with consolidated, reengineered applications – to share information and form the single, unified, standard, FFMIA-compliant environment.

**2.0     Scope**

The contractor shall provide software, technical, administrative, implementation, integration and training support to satisfy the following requirements necessary to implement a Message Management/Customer Contact System for Defense Finance and Accounting Service.  The initial procurement will be to satisfy the electronic mail (Email) message management requirements for approximately 800 customer service representatives at a selected Defense Finance and Accounting Service location. A Blanket Purchase Agreement will be established to satisfy the objective system: all Customer Contact requirements for DFAS, as a corporation, regardless of media.  It will be implemented incrementally and will standardize and support four broad categories of functions:

- Input - Accepting, and processing inquiries from a myriad of media into a standard format;
- Processing – Using the standard formatted inquiry and a backbone network to provide internal routing, keep a historical record and pursue a response;
- Output – Distributing the inquiry and/or response;
- Storage – Saving the inquiry and response for future use.

Standardizing these functions will ensure that data, once captured in the system, will be treated uniformly to produce consistent and timely information.

This SOW represents the overall requirements of the DFAS customer contact management.  The first phase requirement to be satisfied is Email message management. Expansion/interface requirements are articulated with a view toward acquiring a flexible, scaleable system to meet long-term requirements.  All DFAS locations are included in the scope of this effort.

**3.0     Objectives:**    The objective of this Statement of Work (SOW) is to obtain contractor's support and services with a Blanket Purchase Agreement (BPA) against General Services Administration (GSA) schedule.  Individual task orders will be placed for specific work.  This BPA will be for a period of five years or the expiration of the GSA Schedule whichever is earlier.  All products and services on the GSA contract are available for a task order.

**4.0**      **Technical Requirements (See Appendix C)**

**4.1**      **Input Requirements**

**4.1.1**    **General Input Requirements**

In order to provide the most efficient and effective customer service, DFAS requires the ability to electronically manage customer messages. It may require more than one tool-set to manage those messages, but if multiple solutions are necessary, they must be integrable, flexible, and extensible enough to allow growth in the future, near and far term, i.e., 6 months to 2 years respectively. Such integration will support the development of a corporate DFAS knowledge base. For example, the corporate solution for Email messages may be a specific application that accepts incoming messages and, based on a predefined set of rules, automatically logs, routes, tracks, and escalates the messages. It should be flexible enough to accept a digitized form of a facsimile or letter and process it in the same manner. Similarly, voice forms resulting from phone calls, and electronic forms resulting from web interactions should be handled in a similar manner. The product(s) must also allow the accomplishment of cross-functional/organizational synergy that allows sharing of common information about customers. DFAS should have the ability to take pertinent and relevant information, aggregate it, and develop a common data set, so that all of the organization can share information. The product(s) supplied should be web-based, shall reduce/eliminate duplication of effort, and allow easy access to any historical data that can immediately assist the customer. The product must utilize standardized letter templates (which prompts consistency), and artificial intelligence (AI) that provides for customized automation strategies. Specifically, AI will provide the ability to develop unique automated functionality through integration with existing databases and business applications without human intervention.

The Email Message Management/Customer Contact System must allow DFAS to set and meet goals, plus be extensible and flexible to address changes. The product(s) should be capable of 'Live-chats' and 'Voice-over IP' for future expansion and enhancement of customer services. The product(s) must provide workflow capabilities for hand-off situations. That implies escalation and/or forwarding the inquiry. DFAS must have the capability to establish customer response goals, for example: 1, 4, 24, 48 hr. response times.

The system must be equipped with a redundant processing function arranged to switch automatically to the backup system in the event of server failure.

The system must be transportable to the extent that it can accommodate moves of individuals and entire departments.

The system must have the ability to archive and back-up for recovery purposes.

### 4.1.2    Specific Requirements for Handling Incoming Inquiries

The initial requirement is to satisfy incoming inquiries via Email.  The future requirement includes expansion to all types of incoming media.  The Email Message Management/Customer Contact System shall automatically and efficiently route inquiries to the appropriate organizational department where reply/action is required.  Additionally, the Email Message Management/Customer Contact System should track inquiries, capture/store data, generate various managerial reports, and offer a variety of letter/telephone log templates.

The Email Message Management/Customer Contact System, at a minimum, must have the following specific capabilities:

a.  The system must receive, screen, and route all customer inquiries to the appropriate department based on the subject and/or content of the message.

b.  The system must assign each incoming  customer inquiry with a unique tracking number.

c.  The system must send the customer a receipt acknowledging DFAS has received the message.

d.  The system must be equipped with a redundant processing function arranged to switch automatically to the back up system in the event of server failure.

e.  The system must be configurable to the extent that it can accommodate moves of individuals and entire departments.

f.  The system must equitably distribute messages among the agents.

g.  The system must have audit trail capability ensuring the entire history of a transaction is stored.  The system must provide tracking and reporting of the inquiry and response process, as well as the complete text of the initial inquiry and agency/partner directorate response.  The system must also provide the initial delivery and time a message was forwarded, the name or ID information of the employee that responded and the response time, if and when a message was forwarded to another employee, to whom forwarded, date and time the employee responded to the inquiry, and the text of the response.

h  The system must provide the administrator the ability to create a library of standard template responses to commonly asked questions.  The system must also have the ability to take selected templates and automatically publish them on the DFAS web site as a tree structured, searchable knowledge base. The web site maintains a dynamic link with the database, and can be updated at any time to reflect changes and additions to the templates.

- Web Contact
  - Same tool handles e-mails generated from web visit
  - Statistics (Current)
    - Source
    - Date/Time
    - Pages requested
    - Domain
    - Volume
    - Page Sharing - Push a web page for the other party to view
    - Follow-me - View a series of pages without having to push each
    - Complete a Web Form jointly with an Agent
    - Text Chat - Chat over the Web, avoids voice call
    - Application Demo - Agent's ability to demo a software application
    - Application Sharing - Customer's ability to interact with an application
    - White-boarding - Interactively use a white board to draw text, etc.

i. The system must serve as the direct gateway and interface with the Internet. The system must be compatible with the Simple Mail Transfer Program (SMTP) protocol. The system must receive all incoming inquiries and send all outgoing responses.

j. The system must have Artificial Intelligence (AI). AI provides the ability to develop unique automated Email management functionality through integration with existing databases and business applications.

k. The system must provide Management Information Reports (MIR). The system must be programmed to provide visual display and hard copy cumulative management reports. Flexible query and presentation of management information is required in order to summarize and average data per message pool and individual agent. The system must generate managerial reports that include but are not limited to the following:

1. Standard and ad hoc reports in user selected increments (i.e. daily, monthly, yearly or a specific range of dates).

2. Agent activity reports. Must provide overall agent activity reports (i.e. agent response time, number of messages processed, telephone logs created, etc.) to evaluate agent performance.

3. System activity reports. Must provide system activity reports daily, monthly, yearly or a specific range of date increments, displaying number of messages received in total, by message pool/partner directorate, agent group, or agent; messages/telephone logs handled outstanding, in progress etc.

4. MIR can be run as requested or as a regularly scheduled event, to update current statistics automatically.

## 4.2 Inquiry Processing Requirements

### 4.2.1 General Inquiry Processing Requirements

Once an inquiry has entered the system from any of the above mentioned methods, the inquiry must be captured in a message record for additional processing. Additional processing requirements include, but are not limited to, generating an automatic response, routing the inquiry for resolution, retrieving data to assist in the resolution, logging and tracking the inquiry. (Knowledge database is the response information source, not history file.)

### 4.2.2 Specific Inquiry Processing Requirements

The contractor shall ensure the capabilities for inquiries processing include, but are not limited to, the following:

- For each incoming message:
  - Create a contact record
    - Assign unique message ID
    - Date and time stamp
  - Automated Receipt acknowledgement
  - Keyword searches on
    - Originator
    - Customer identifier (SSN or contract number, etc.)
    - Subject Line
    - Text
    - form number (DD 250, etc.)
  - Based on keyword search, provide ability to:
    - Prioritize
    - Route
      - To agents
      - Referrals
        - Internal
        - External
          - Other centers
          - Other systems
          - Partnering activities
    - Flexibility to accommodate multiple site-specific routing strategies
      - Push/pull queuing
      - Queue to pool or individual
    - Routing decisions include option to transfer workload to other systems

- Logging and Tracking/Audit Trail searchable by
  - Customer ID
  - Contract Number
  - Message ID (unique ID)
  - Agent
  - [Problem type]

## 4.3 Output Processing Requirements

### 4.3.1 General Output Requirements

After an inquiry has entered the system, the response may be automatically generated, may require investigation and formulation of a response, or may need to be investigated and escalated. General output requirements include, but are not limited to, producing standard and ad hoc reports; producing standard, automated, and ad hoc responses; escalating the inquiry; referring the inquiry to another area of expertise; and storage.

### 4.3.2 Specific Output Requirements

The contractor shall ensure the capabilities for output processing include, but are not limited to, the following

- Reporting
  - Standard reports
    - By type of query
      - Topic (e.g. entitlements)
    - By originator type
    - Routing History
      - By Center
      - By Dept
      - By Agent
    - By turnaround time
    - By function
    - Trend Analysis
    - Aging
      - Priority flags
      - Escalation (routing /special handling/by age)
        - Management decision
      - Over age (By Service Level Agreement (SLA) thresholds)
      - History
    - Audit / Contact history
      - By customer
      - By topic

- Volume Breakdown
  - By type of response (e.g. Automatic response, human)
  - By topic
  - By agent
  - Escalated messages
- Ad hoc reports
- Easy to use
  - Ability to establish access controls
  - Flexible rules
  - Locally configurable
  - Distributed access
- Contact Record
  - Ability to add fields (e.g. reason code)
  - Not all fields required
- Quality Assurance (QA)
  - Supports QA searches/queries
    - Random selection
    - Keyword search
    - By agent
    - Respond
      - 
      - Automated
      - Proposed response based on library of canned responses
      - Human response
  - Escalation
    - Flags set on predefined rules
    - Flexibility to set flags according to ad hoc rules
      - By originator
      - Aging
      - By topic
      - Area of Responsibility (AOR) during conflict
      - Hot topics
    - Standard set for each site
    - Escalate by agent request
    - Automatic electronic notification of escalated messages (e.g. Instant Message (IM))
    - Escalation implements predefined structure/procedures
  - Referrals
    - Handle internal messages/memos/taskers
    - Indicate who has responsibility (information versus action)
    - Provide read-only access
    - Maintain and view referral history

**4.4      Storage Requirements**

**4.4.1   General Storage Requirements**

After an inquiry has been resolved, the inquiry, supporting data, and resolution must be added to the database for potential future use.  General storage requirements include, but are not limited to, records management and archiving, and repository characteristics.

**4.4.2   Specific Storage Requirements**

The contractor shall ensure the requirements for inquiry and resolution storage include, but are not limited to, the following:

- Records management and archival in accordance with (IAW) policy
  - Online versus other access
  - Ability to purge database of closed records IAW aging and records retention requirements

- Repository characteristics
  - Flexibility
  - Maintainability
  - Customize over time
  - Ease of use
  - Distribution/sharing across multiple sites
  - Searchable
    - Browse
    - Query

**4.5.  Expansion to Future Customer Contact Management Requirements**

**4.5.1   Functions**

In addition to the specific requirements defined to support the four function areas given in the previous sections, the contractor shall ensure the message management solution includes future scalability/expandability to:

- Multi-user application(s) to be used to manage customer inquiries
- Same tool handles contact management for all media is ideal
  - Accept e-mails, e-forms, voice forms from Integrated Voice Response (IVR), agent entry form
  - Other media (fax, paper, face to face) will be converted to e-mail like format prior to input to tracking system
  - Support standard fields and formats regardless of media

- Voice Contact

- Generate an entry form for every
  - Voice contact
  - Inquiry - Multiple inquiries may be made in one contact
  - Other considerations
    - Time and efficiency trade-offs
    - (Note:  screen pop-up only applies when transferring to a live agent which is outside the scope of this project)
    - Standard platform
    - Voice forms and agent entry forms flexible enough to serve a variety of functions
    - Receipt acknowledgement for every voice contact at the time the message is left.  Voice to text message translations capable of being converted to the Email Message Management/Customer Contact System.

- Facsimile (fax) Contact
  - Digitized fax image accepted into message management system directly without paper printout.
  - Automated acknowledgement upon receipt of return fax to address received from original transmission—must be generic in nature without Social Security Number (SSN) or other Privacy Act information.
  - Match incoming fax with existing case file by subject matter type and name, not by name/SSN only.

- U.S. Mail / Correspondence
  - Scan into system (image)
  - Create contact record with unique identification (ID)
  - Receipt acknowledgement or automated response under certain conditions (interim response)
    - Form letter
    - Referral card

- AUTODIN/Defense Message System (DMS)
  - Contact records for every contact
  - Digitize or scan in actual message for association with record and/or other contacts
  - Automated response if appropriate

- Face to Face
  - Contact records for every contact
  - Associate with past records if appropriate

- Integration
  - Integration with corporate knowledge base
    - Customer Profile

- Regulation research
- Interface to other systems
  - For example, ability to port volume data to cost reporting
- Integrates into existing environment
- Supports touch point alignment
- E-mail responses must feed into other systems
- Capability to interface to formats and features of military messaging

## 4.6   Training

Training and consulting services must be available in support of deployment.  Training and documentation must be provided for day-to-day systems administration, as well as, training for agents, supervisors and partner directorate personnel.  Consulting services must also be provided for individual unique cases.  Software maintenance will also be provided by the vendor.

## 4.7  ADP Requirements

### 4.7.1  Software Products

Workstation software products shall operate on IBM compatible servers and execute under Windows NT version 4.0 or later DFAS operating standards.   Must be compatible with Microsoft Exchange/ Outlook.  The system administrator, supervisors, and agents must be able to print reports and letters using current PC's (pentiums or higher) running Windows NT, to laser printers over a Novell network.

### 4.7.2   Models and Databases

Models and databases shall be compatible with standard DoD and DFAS tools and database software, i.e., Oracle and Designer products (versions based on current DFAS corporate standards).  Data base management systems must be based on either Oracle 7.34 or Oracle 8.06.

### 4.7.3 ELAN Environment

All systems to be provided by this contract must adhere to the DFAS ELAN Infrastructure standards. All data communications must be accomplished via generic TCP/IP or IPX.

Client systems must be Intel/Cirix/AMD based PCs running Windows NT 4.0 or Windows 2000. All client to server communications must be accomplished via generic TCP/IP or IPX and must be accomplished with the NT Workstation and Server services disabled, i.e. Windows NT/2000 networking must not be required.

Server operating systems must one of the following: Novell Netware 4.11, Windows NT 4.0, Windows 2000, Sun Solaris 11.0, or HP-UX 2.7.

### 4.8 Approval of Application Software

The contractor shall have the application software tested and approved by DFAS prior to use on this contract. Testing will be accomplished in accordance with the attached Software Test Plan.

### 5.0 Reports and Deliverables

**5.1 Program/Project Management**. The Program Manager shall oversee all of the activities outlined in this statement of work (SOW). The Project Manager for each task order will be responsible for determining the management, organization, authority, responsibility, controls, and the extent they apply to the project in the areas of: cost, schedule, technical performance, quality improvement, delivery of products, and project administration.

**5.2 Performance and Cost Report**. The Contractor shall prepare and deliver a Performance and Cost Report (CDRL A001), and a summary Project Status Report to the Contracting Officer's Representative. The Contractor shall report status and cost by task order, then consolidated for overall BPA totals.

**5.3 Managerial Best Practices Integration**. Identify and integrate best practices relating to strategic planning, resource management, configuration management, software quality assurance, project planning, project tracking and oversight, risk assessment, etc.

**5.4     Status Report**.  The Contractor shall prepare and deliver to the Contracting Officer's Representative, with a copy to the Contracting Officer, a Status Report (CDRL A002) reflecting the current status of ongoing task/delivery orders.  The Status Report will also contain other relevant information regarding problem areas and the course of action taken in their resolution, potential problems anticipated significant activities, planned upgrades/changes to hardware, software, schedules and procedures, work progress and contract costs.  The Contractor shall submit a copy of the Status Report to the COR, with a copy to the Contracting Officer.  The Contractor shall provide data to prepare plans of action and milestones (PA&Ms) as directed by the Government Program Manager.

**5.5     Labor Reporting Systesm (LRS) Inputs**.  The Contractor shall provide a copy of the hours to be input into the LRS by person (including name), labor category, date, and hours worked.

**5.6     Deliverables/Delivery Schedule.**

| SOW Task# | DID# | TITLE | CDRL# | DUE DATE |
|-----------|------|-------|-------|----------|
| 1. Performance | DI-FNCL-80912 | Monthly Cost Report | A001 | Monthly on 5$^{th}$ workday |
| 2. Status Report | DI-MGMT-80368 | Status Report | A002 | Monthly on 5$^{th}$ workday |
| 3. Progress Report | DI-ADMN-81313 | Progress Report | A003 | Monthly on 10$^{th}$ workday |

**6.0     Expertise**

**6.1     Company experience.**   The Offeror must have three years past experience in providing message management software and services for a similar size organization.

**7.0.    Government Furnished Information (GFI)**

DFAS has a number of existing tools, capabilities, and initiatives that are currently in use to satisfy some portion of the customer service management requirements.  These tools and capabilities vary by site and none offer a single corporate solution.  The contractor shall consider the capabilities (located in Appendix C) and investment in these solutions when proposing an Email Message Management/Customer Contact System.

**8.0     Security Requirements**

**8.1     Security and Privacy Act Requirements**:  Most of the work that is performed relative to the tasking identified in the SOW is unclassified or carries a Privacy Act classification.  System security shall be in accordance with DoD Directive 5200.28, Security Requirements for Automated Information Systems (AIS).  The level of security will be identified in each task order.

**8.2     Security Investigation Requirements:**  Positions identified as "Critical-Sensitive/ ADP-1" will require a background check.  Contractor shall submit for SF86 according to agency procedures DoD 5200.R.  If adverse information is reflected as a result of this investigation, the Contractor must provide employees that are suitable for working in a sensitive position.

**8.3     Non-US Citizen Employee Requirement:**  Non-US citizens will not be allowed to perform work on contracts or subcontracts involving access (or possible access) to sensitive data, software, or equipment without prior approval per requirements list in paragraph 8.1 above.  FAR 52.204-2 Security Requirement Applies.


**9.0.  Special Requirements**

**9.1     Work Hours**

The Contractor can anticipate that all tasks will be completed during normal working hours.

**9.2     Travel**

Travel to DFAS Headquarters and other DFAS Centers will be accomplished as required to collect technical and programmatic information to support this effort.

All travel is to be approved by the Technical Assistant before travel commences.  The costs of travel will be reimbursed in accordance with the DoD Joint Travel Regulation.  The likely destination for phase 1 is Cleveland, OH.  Other destinations for remaining phases include, but are not limited to, Denver, CO, Indianapolis, IN, Columbus, OH, and Kansas City, MO.

**10.0  Period of Performance**

The period of performance is 90 days from contract award for the first phase, DFAS-CL Email Message Management System.  However, the BPA period of performance will be for a base year, plus four one-year options, or expiration of the GSA schedule if it occurs prior to options being exercised.

**11.0     Administrative Considerations**:  The Government's representatives and their respective roles are as listed below:

**11.1   Contracting Office:**
TBD
DFAS ASO/CPI CM3, Room 227
1993 Jefferson Davis Highway
Arlington, VA  22240-5291
Tel:  (703) 602-XXXX
Fax:  (703) 602-8773
Email:


**11.2   Contracting Officer's Representative (COR)**
TBD
DFAS-ISO
8899 East 56$^{th}$ Street
Indianapolis, IN  46249-2801
Tel:  (317)-510-XXXX
Fax:  (317) 510-7219
Email:

**11.3   Invoice Submission.**   The Contractor shall forward all task order invoices to the technical assistant (TA) designated in each task order, together with supporting documentation necessary to verify cost expended against the order.  Such documentation may include, but is not limited to, labor category, hourly rate, subcontractor invoice(s), time sheets, etc.  After the TA verifies and certifies the invoice, it will be forwarded for payment.

**11.4   Approvals.**   Any effort outside the scope of the work or period of performance stated herein shall only be accomplished through the issuance of a modification.

**11.5   Qualifications Factors.**  DFAS will validate & evaluate contractor's quotations submitted in response to this RFQ.  Quotations will be validated to insure (1) preparation in accordance with instructions in this RFQ; (2) compliance with all requirements; (3) accuracy of price quotation; and (4) compliance with DFAS Terms and Conditions outlined in the Statement of Work.

**12. 0  Format and Instructions for Proposal Preparation:**

**12.1**    The Prime Contractor proposal shall be prepared in accordance with these instructions.  A cover letter shall be used by the Prime Contractor to transmit the proposal and is considered a part of the proposal.  This cover letter shall also be used to transmit any information the Prime Contractor wishes to be brought to the attention of the Contracting Officer including any exceptions taken to the Solicitation.  In accordance with FAR 52.214-7, a late submission by the Prime Contractor may be cause for rejection of the entire proposal.

**12.2**    The proposal shall be submitted in one original hard copy with three (3) additional copies.  The following information shall be provided:

12.2.1    Cover letter
12.2.2    Table of Contents
12.2.3    Hard copy of the FSC Group 70 GSA Schedule
12.2.4    Technical
12.2.4.1 Management Plan

Within the management approach factor, the offeror shall demonstrate an understanding of the management objective for the requirement; it's corporate structure and the functional relationships and responsibilities among the organizational elements that will participate in accomplishing the defined tasks.  Within the management approach factor, the offeror should address the following areas as well as any other information relevant to performance of the Statement of Work:

  - The offeror shall demonstrate an understanding of the management objectives for the requirement.

  - Quality Assurance Plan intended for use in performance of the required Task.

  - The proposed use of subcontracting or teaming that may be planned, when and how subcontractor resources are to be used.

  - The offeror's project control procedures used to plan, track and control multiple taskings.

12.2.5 Technical Approach

  - Within the technical approach (Management Transition Plan) factor, the Offeror shall demonstrate the technical approach that will be used.

  - Number of calendar days required for start-up.

### 12.2.5 References

The information provided by the Prime Contractor should demonstrate the relevancy of its past experience and quality of past performance in the areas listed below. Relevancy includes similarity of the experience in the size and scope as it relates to the requirements of the SOW under this RFQ. The contractor shall provide 5 contract references for similar type equipment/services. The Government will evaluate three of the five references. The Government may also obtain past performance information from sources other than those provided by the Contractor.

12.2.5.1    Evaluation of past performance/experience will be a subject assessment based on consideration of all relevant facts and circumstances. IT will not be based on absolute standards of acceptability. When assessing the quality of the Contractor's past performance, the Government will seek to determine whether the Contractor has consistently demonstrated a concern for customer satisfaction. This is a matter of judgement. The following elements will be evaluated and are of equal importance:

Detailed response to Section 6.1. A list that provides an overall list of contracts. A list of three references shall be submitted that include: (1) Contract number; (2) Period of performance; (3) Point of Contact's name, telephone number, and email address; and (4) how the service performed relates to the SOW tasks:

a. Experience and knowledge of Customer Call Center requirements and operations and Customer Service Management.

b. Experience in software and hardware integration, implementation, and training.

c. Ability to develop recommendations and implement automated solutions relative to the customer service management requirements of a large Defense agency.

A higher rating with DoD and DFAS experiences.

### 12.2.6 Price Sheet

12.2.6.1    Contractors shall provide the following information:

a. Identify the skill levels required to accomplish the work, the number of hours needed for each skill level, and the associated labor rate for each skill level. Summarize the extended price by labor hour category. Provide a complete price proposal for all work tasks.

b. Labor mix and hours per category.

12.2.6.2    As delineated in the cover page, it is the intent of this BPA to secure discounts on a per order basis as well as on a cumulative basis throughout a given year or

the life of the BPA. Therefore your proposal may be structured accordingly. For example, if the Government issues a task order for $500k it will receive X discount and in addition, if the total cumulative amount of all orders placed against the BPA exceeds $1M, the Government will receive a constant discount of X, regardless of the year in which the delivery order is placed. Contractors may extend the period of constant discount beyond a given year if they choose to do so.

## 13.0 Evaluation Factors

The contractor's response to the RFQ must provide detailed information sufficient to enable an evaluation based on best value criteria. The four evaluation factors are listed below in descending order of importance. Factor 1 is of greater importance than Factors 2, 3, and 4, which are of equal importance.

> FACTOR 1: TECHNICAL APPROACH – 50 page limitation
> FACTOR 2: PAST PERFORMANCE – 10 page limitation
> FACTOR 3: MANAGEMENT PLAN – 5 page limitation
> FACTOR 4: PRICE

## 14.0  Appendix B – Acronyms

| | |
|---|---|
| ACAT | Acquisition Category |
| ACD | Automatic Call Distribution |
| ADP | Automated Data Processing |
| AOR | Area of Responsibility |
| AUTODIN | Automatic Digital  Network |
| CARD | Cost Analysis Requirements Documentation |
| CBT | Computer Based Training |
| CTI | Computer Telephone Integration |
| DCII | DFAS Corporate Information Infrastructure |
| DFAS | Defense Finance and Accounting Service |
| DJMS | Defense Joint Military Pay System |
| DMS | Defense Messaging System |
| DoD | Department of Defense |
| EA | Economic Analysis |
| EDM | Electronic Document Management |
| E/MSS | Employee/Member Self Service |
| FAX | Facsimile |
| FFMIA | Federal Financial Management Improvement Act |
| GFI | Government Furnished Information |
| GSA | General Services Administration |
| HQ/S | Defense Finance and Accounting Service Headquarters/Information Management |
| ID | Identification |
| IM | Instant Message |
| IMATS | Information Management and Tracking System |
| ISO | Information Security Office |
| IVR | Integrated Voice Response |
| LCCE | Life Cycle Cost Estimate |
| MCTFS | Marine Corps Total Force System |
| MIRORS | Mail Image Routing and Optical Recording System |
| MTF | Military Text Format |
| OSD | Office of the Secretary of Defense |
| PA&E | Program Analysis and Evaluation |
| PKI | Public Key Infrastructure |
| PLA | Plain Language Addresses |
| QA | Quality Assurance |
| SEOPE | Software Engineering Office-Pensacola |
| SEOPR | Software Engineering Office-Pax River |
| SLA | Service Level Agreement |
| SOW | Statement of Work |
| WAWF | Wide Area Work Flow |

**15.0    Appendix C – EVALUATION CRITERIA**

**GSA BLANKET PURCHASE AGREEMENT (BPA)**
**Electronic Mail (E-Mail) Management System**


**15.1  RFQ ISSUE DATE:    August 31, 2000**

**15.2  ISSUED BY:**                DEFENSE FINANCE AND ACCOUNTING SERVICE
                                                  ATTN:  JAMES RICHARDS,  ASO/DPB, CM #3
                                                  1931 JEFFERSON DAVIS HIGHWAY, ROOM 227
                                                  ARLINGTON, VA  22240-5291


**15.3  FOR INFORMATION CONTACT:**

| | |
|---|---|
| **NAME:** | James Richards, Contract Specialist |
| **PHONE:** | (703) 607-5726 |
| **EMAIL:** | james.richards@dfas.mil |
| **FAX:** | (703) 602-5642 |


All questions shall be submitted electronically to the Contract Specialist by 12 SEP 00.

**15.4  PROPOSAL DUE DATE/TIME:  October 27, 2000, 2:00 P.M. E.S.T**

**15.5  SUBMISSION OF WRITTEN PROPOSALS:**  Submit signed and dated proposals on or before the date and time indicated above.  ELECTRONIC SUBMISSION OF PROPOSALS, TO INCLUDE FACSIMILE, IS NOT AUTHORIZED.  If submitted via **POSTAL SERVICE**, proposals should be sent to the official mailing address in paragraph 15.2 above.

**ALL HAND-CARRIED PROPOSALS (INCL. FEDEX, UPS, ETC.) SHALL BE DELIVERED TO THE CONTRACTING OFFICE AT:**

JAMES RICHARDS
DFAS ASO/DPB, CRYSTAL PLAZA #6
2221 SOUTH CLARK STREET, ROOM 536
ARLINGTON, VA  22240
\*\*There is no postal service direct mail delivery to Crystal Plaza #6.

**15.6.  SUBMISSION OF TEST E-MAIL MANAGEMENT SYSTEM:**  All Offerors shall submit ONE (1) complete E-mail Management System in response to the RFQ for testing not later than the proposal due date indicated in paragraph  above.  All transportation costs to and from the DFAS ELAN Platform Engineering Team (EPET) shall be borne by the Offeror.  The Government will keep the Awardee's equipment at the EPET after award and those systems shall become Deliverables #1 and #2 (or #1 through #4) of the first delivery order under the BPA.

Equipment shall be delivered to the following address for testing and evaluation:

> DFAS-EPET (Cleveland, OH)
> DFAS-CL
> 1240 E. 9TH ST
> CLEVELAND, OH
> 44199-2055

ATTN: Kevin Manges room 2219

**15.7.  QUESTIONS:**  All questions regarding this RFQ or the attached Statement of Work (SOW) shall be submitted in writing to James Richards via facsimile or via email.  Questions are due no later than **September 12, 2000**.  A copy of the questions and Government responses will be provided to all prospective Offerors via email.

**15.8.  STATEMENT OF WORK:** ~~See ATTACHMENT 1~~.   It is the intent of this BPA to acquire E-Mail Management System and other related software and support services, including maintenance and future upgrades in equipment, that are available through the selected vendor's GSA Schedule.  All supplies and services offered on selected vendor's GSA Schedule will be available for purchase under this BPA.  Notwithstanding, the Government will not evaluate each and every product or service proposed or available under your schedule.

**15.9. QUANTITY/DELIVERY SCHEDULE:** The Government anticipates the purchase of the following quantity of E-Mail Management systems over the next five fiscal years. These figures are estimates only and may increase depending on available funding. Individual delivery orders will be issued for the precise quantity. Delivery of the remaining systems shall be no more than 15 days after receipt of order, in accordance with the terms of the GSA Schedule.

| FY | QTY EACH |
|----|----------|
| ~~00~~ | ~~1~~<br>(including Awardee's test system) |
| 01 | ~~2~~ 3 |
| 02 | 2 |
| 03 | 2 |
| 04 | 2 |

**15.10. TEAMING ARRANGEMENTS:** Teaming arrangements are permitted with Federal Supply Schedule contractors in accordance with FAR 9.6.

**15.11. PROPOSAL FORMAT:**

THE GOVERNMENT INTENDS TO AWARD WITHOUT DISCUSSIONS. Therefore, each Offeror is urged to examine this solicitation in its entirety and to ensure that its proposal contains all necessary information, provides all required documentation, and is complete in all aspects.

> **15.11.1** Each proposal shall be submitted in four (4) separate and individual parts and in the number of copies as set forth below. All information shall be confined to the appropriate volume to facilitate independent evaluation.

| PART NUMBER/TITLE | COPIES | PAGE LIMITATION |
|-------------------|--------|-----------------|
| I - GENERAL<br>Include best value statement | 1 Original | None |
| II - TEST EQUIPMENT<br>Management Systems | 1 each  complete | E-Mail |
| III - PAST PERFORMANCE | 1 Original | None |
| IV - PRICE | 1 Original | None |

**15.11.2**  To aid evaluation, written portions of the proposals shall be clearly and concisely written as well as being neat, indexed (and cross-indexed, as appropriate), and logically assembled.  Proposals should be typed single-sided pages (not including resumes), no less than 12-point (pitch) type.  All pages shall be appropriately numbered.  Offerors are cautioned that while a professional submission is desired, excessive brochuremanship is neither preferred nor beneficial.  **Any cost/price information should be contained in PART IV - PRICE only.**  The desired format and contents of each of the required four (4) physically separated and detachable parts of the proposal are as follows:

**PART I, GENERAL.**  At a minimum, this PART shall contain:  (a)  Offeror's GSA Schedule Number, (b) a copy or brochure of the GSA schedule; (c) name, address, and telephone/FAX number of offeror, and (d) name, address, telephone/FAX number, and email address of Offeror POC.  This part shall contain any commercial literature, including warranty and support terms provided to GSA Schedule customers.  This section may also contain a Best Value statement depicting why the offeror feels the software proposed offers the best value to the Government.  Any cover letters forwarding the proposal shall be contained in this PART only.  There is no page limitation to this PART.

**PART II, TEST SYSTEM**.  One (1) each E-Mail Management  System shall be submitted for evaluation and testing to the DFAS EPET Test Lab in Cleveland, OH, in accordance with paragraph 6 above..

**PART III, PAST PERFORMANCE.**  This PART shall address the information as indicated in paragraph 12.2 15.12.4 below.  Past performance information shall include recent and relevant contracts for the same or similar equipment and services.  Offerors shall provide references including contract numbers, points of contact and current telephone numbers.  There is no page limitation to this PART.  Any cover letters included in this PART shall not be considered.

**PART IV, PRICE.**  This PART shall address all the information as indicated in paragraph 12.3 below.  There is no page limitation to the PART.

**15.12.  EVALUATION CRITERIA:**  The Department of Defense (DoD) will consider the following factors when evaluating Offerors' proposals.  The DoD believes that each evaluation factor is critical to the effective accomplishment of the tasks in the statement of work (SOW).  Therefore, failure to fully meet any one factor could disqualify a proposal.  Each Offeror shall be evaluated based on the factors of Technical, Past Performance, and Price.  *See paragraph 15.13 below, Basis for Award, for an explanation of the relative importance of these factors.*

**15.12.1 The Technical Factors are divided into two main sections: Technical Requirements and the EPET Lab Test Plan. The E-Mail Management System be will assigned points and ranked in accordance with the instructions for each of these two sections. Each section will account for 50% of the cumulative Total Technical Evaluation Score that EPET will assign to each system at the end of this process. The system with the highest total score will be the one that EPET will recommend as the best technical solution. The system with the second highest total score will be the next best choice technical solution and so on.**

**Each system will be evaluated for the following two different uses,**
**1) Required Capabilities, and**
**2) Desired capabilities.**
**It is possible that one system could be evaluated as the best solution for both areas..**

**15.12.2. Proposed approaches will be evaluated based upon:**

**1) The extent to which they employ disciplined, structured processes (versus ad hoc or anecdotal) to identify and mitigate manufacturing process risks (e.g., the risks related to developing stable and capable processes, to minimizing the need for engineering changes, to preventing defects, etc.).**
**2) The extent to which the processes for identification of key product characteristics and identification/mitigation of manufacturing process risks are integrated with the overall systems engineering process.**
**3) The extent to which the proposed approaches reflect the integration of manufacturing process risk reduction efforts into the planning for this program.**

**The Technical Requirements section contains both Required and Desired technical elements. All systems submitted in response to this RFQ shall meet ALL of the Required elements. It is the vendor's responsibility to ensure that these basic elements are met prior to submitting a system for testing. *Systems that do not meet all Required technical elements will not be considered for further testing and evaluation.***

Systems that meet all Required technical elements will be rated further on how many of the Desired technical elements are met. There are XX pass/fail Desired elements. Each system will receive one (1) point for each Desired element met. There is a maximum score of XX in this section.

The EPET Lab Test Plan details specific testing which will be performed on each system in the Cleveland test facility.  The purpose of these tests are to determine how well certain Desired elements perform and to gauge the performance of the system under high load levels and network stress.  Each of these tests have been assigned a maximum point value, and each system will be assigned a numerical point score from zero (0) to the maximum points allowed in that element.  A system's score will be based on its performance in each element, relative to the performance parameters called out for each element.  The total maximum possible score (combination of all the maximum points assigned to each test element) in the EPET Lab Test section is 100 points.

The maximum possible score for each system in the Technical Requirements portion of the evaluation will be 25.  The maximum possible score for each system in the EPET Lab Test portion will be 100 points.  Since each of these two sections will account for 50% of the system's final rating, the points gained in the EPET Lab Test will be divided by 4 and then added to the points gained in the Technical requirements section. This sum will then be the cumulative Total Technical Evaluation Score.

For example:
System ABC receives a total score of 15 points for Desired elements.
System ABC receives a total score of 80 points for the EPET Lab Test.
Total Technical Evaluation Score (System ABC) $= 15 + 80/4 = 35$

**15.12.2  TECHNICAL FACTORS**.  The contractor shall be required to furnish equipment and maintenance that meets or exceeds the following technical requirements. The software fully integrates with the Microsoft Outlook environment. In addition, intelligent agents must provide up to the minute knowledge base that can intelligently respond to customer inquiries without human intervention.


**SECTION I:  TECHNICAL REQUIREMENTS**


**15.12.2.1  Required Elements**
*(Offerors whose products do not meet these minimum requirements will not be considered for further evaluation and testing and will be ineligible for award.)*

1.    The system must automatically receive, screen, route and queue internet e-mail inquiries to the appropriate message pool based on the subject and/or content of the message.

2.    The system must create a unique tracking number to identify each message received/sent.

3.    The system must equitably distribute messages among the DFAS Customer Service agents assigned to a specific message pool and route to appropriate partner directorate.

4.      The system must have audit trail capability ensuring the entire history of a transaction is stored.  The system must provide basic level reporting for every step of the inquiry and response process, as well as, the complete text of the initial inquiry/telephone log and agency/partner directorate response.  The system must also provide the initial delivery and time a message was forwarded, the name or ID information of the employee that responded and the response time.  If and when a message was forwarded to another employee, to whom forwarded, date and time the employee responded to the inquiry, and the text of the response.

5.      The system must provide the administrator the ability to create a library of standard template responses to commonly asked questions.  The system must also have the ability to take selected templates and automatically publish them on the DFAS website as a structured, searchable knowledge base. The website maintains a dynamic link with the e-mail message system database, and can be updated at any time to reflect changes and additions to the templates.

6.      The system must serve as the direct gateway and interface with the Internet.  The system must be compatible with the Simple Mail Transfer Program (SMTP) protocol.  The system must receive all incoming inquiries and send all outgoing responses.

7.      The system must use artificial intelligence/intelligent agents.  The intelligent agents are an engine for implementation of custom automation strategies.  The intelligent agent provides the ability to develop unique automated e-mail management functionality through integration with existing databases and business applications.

8.      The system must provide Management Information Reports (MIR). The system must be programmed to provide visual display and hard copy cumulative management reports.  Flexible query and presentation of management information is required in order to summarize and average data per message pool and individual agent.  The system must generate managerial reports that include but are not limited to the following:

        a. Standard and AD HOC reports in user selected increments (i.e. daily, monthly, yearly or a specific range of dates).

        b.  Agent activity reports.  Must provide overall agent activity reports (i.e. agent response time, number of messages processed, telephone logs created, etc.) to evaluate agent performance.

c. System activity reports.  Must provide system activity reports daily, monthly, yearly or a specific range of date increments displaying number of messages received in total, by message pool/partner directorate, agent group, or agent; messages/telephone logs handled outstanding, in progress etc.

d. MIR can be run as requested or as a regularly scheduled event, to update current statistics automatically.

9. The reliability and guaranteed performance of the system must be 98% or greater.

10. The problem response time must not exceed two hours from notification. The contractor must provide DFAS with a customer account representative and a vendor hot-line number for critical problems that prevent continued processing.

11. The E-Mail Management/Contact Control system equipment must be installed and put into production within 90 days after contract award.

12. Training and consulting services must be available in support of deployment.  Training and documentation must be provided for day-to-day systems administration, as well as, training for agents, supervisors and partner directorate personnel.  Consulting services must also be provided for individual unique cases.  System software maintenance will be provided by the vendor.

14. Stored Data Requirement:

The system shall store data on a standard DFAS server.  These include: Windows NT 4.0, Sun Solaris, HPUX, and Novell Netware 4.11.  The standard DFAS Database product requirement is Oracle 8I.

15. Interface Requirements.

- Oracle 8I support
- Microsoft Exchange via SMTP gateway.  No POP 3 server shall be used.SNMP integration that incorporates system management utilities via SNMP messaging.
- Interface to Remedy as that is the software tool being used to support the DFAS  Customer Contact Center (CCC) today.
- An integrated development environment (IDE) supporting various programming models (HTML,  XML, Java, ActiveX, HDML,  DHTML, Cascading Style     Sheets, Java  Script, VB Script, and so on) via a universal editor or best-of-breed tools.

- Universal database access to major databases and ODBC/JDBCsupport via native or third-party drivers.
- Security services supporting SSL, SHTTP, socket communication, LDAP, auto message encryption, and an API for custom-built security features.
- Application isolation features that maximize portability by accommodating standalone Java applications, Servlets, JavaBeans, NSAPI, ISAPI, WAI & WAP, and traditional C/C++ options.
- Dynamic load balancing, to efficiently exploit CPU resources as IIM engines automatically scale to meet peak loads. - Working definition of IIM. In essence, it implies the use of a platform for the design, development, and application of information management techniques (data warehousing, data mining, and so on) in combination with other advanced e-business enabling concepts (such as intelligent agent technology and Web content management infrastructure) to manage Internet-based interactions with economically valuable current or future customers. The ideal result is an emergent architecture for dynamic, personalized, Web-based customer-facing systems.
- State management for fault toleranceand global interaction integrity with application, session, user, object, and string state management via an independent state server that eliminates scalability problems.
- User profiling services for gathering customer information and categorizing profiles.
- Interaction monitoring for monitoring the status of interaction sessions with the customer.

16. Interactive Data Entry Requirements.

It is estimated that there will be 200 users initially each day performing data entry, review, modification, and certification. Usage is expected to peak between 0800-1600 hours Eastern Standard Time.

17. Interactive Query Requirements.

It is estimated that there will be 10 users each day performing queries. Query activity will increase as training and product knowledge increase.

18. Client PCs will be login authenticated through Novell Netware 4.11. There will be login authentication through Novell Netware 4.11 and Windows NT.

19. Current Hardware/Software/Communications Environment.

**Server Hardware**

Pentium with 128MB
Hard Drive 200MB or more for program and message files
Internet connection

**Server Software**

The system shall store data on a standard DFAS server.  These include: Windows NT 4.0, Sun Solaris, HPUX, and Novell Netware 4.11.  The standard DFAS Database product requirement is Oracle 8I.

Windows NT, this product can not require Windows NT Networking Services (must be able to operate with server and workstation services disabled
SMTP/email server with SMTP gateway installed

**Workstation Hardware**

64MB Minimum
Hard Drive with 10 MB of available disk space
Internet connection

**Workstation Software**

Microsoft Outlook 98/2000 mail client with Microsoft Exchange Server

The PC hardware must be at least a DFAS standard NT PC with Internet Explorer or Netscape.

20.     Ad Hoc Query Ability.

The customer requires an AD HOC query capability. The recommended software provides AD Hoc reports in user selected increments of daily, monthly, yearly, and specified intervals.

### 15.12.2.2 Desired Elements

*(Each system will be rated 0 or 1 for each item below. Maximum score is 25 points. This section will count 50% of the Total Technical Evaluation Score)*

1. Tracking and escalation software, which is integrated with the front-end CSS servicing application for Web-based inquiry management
2. Problem-enabled knowledge management software to provide natural-language-like interfaces and allow customers to research inquiries by themselves
3. An e-mail response management system for managing inbound and outbound e-mail messages
4. A universal queue management system, which functions as a funnel, integrating multiple channels —   such as telephone, interactive voice response, speech recognition, the Internet and the Web — to standardize the handling of all customer inquiries
5. Collaborative chat, which facilitates integration between enterprises and their customers via theWeb. Voice over IP, while immature, will be an essential component of e-service environments by 2002
6. Collaborative filtering:
   Requires a large network of active users with a vested interest in updating the ratings and adding new items (e.g., the latest movies) as they become available.
   - Collaborative filtering: The user's agent identifies users with similar tastes and uses their ratings as the basis of  its recommendations.
   - Content-based filtering: The agent tries to discover patterns in the nature of the items the user finds interesting and relevant, and uses this to guide recommendations (e.g., keywords in documents, directors or actors in movies).
   - Learning by observation: The agent watches and tracks the user's interaction with the computer to identify commonly performed tasks it can automate (e.g., E-mail management, operating system macros).
7. Mining E-Mail for Experts and Knowledge
   Develops procedures to encourage and support the transformation of tacit knowledge into explicit knowledge, i.e., recording and publishing what is known by key individuals.

   E-mail authoring provides a good indicator of interest areas, at the very least, and thus a     profile generated from analysis of an individual's e-mail output can serve as a useful indicator of skills. maintains a profile of users from their e-mail, allowing queries to be made against the profile database
8. Team Management of E-Mail:
   Provides a more structured framework for management of e-mails.  Enables ephemeral material to be separated more easily from that of  lasting value, and for e-mail archives to be managed as a group resource, rather than being left to each individual.

Provides a centralized repository for management of e-mails as well as other knowledge sources (e.g., documents and Web pages).  Can be extended beyond the enterprise to encompass wider communities, such as those involved in business-to-business e-commerce

9.  Support it at a mission-critical level (including service-level guarantees).
10. Provide it with strong administration.
11. Continually assess the communication needs of the e-mailers.
12. Manage e-mail under privacy policies, training its users not merely in the mechanics of sending and receiving e-mail, but also in its proper management, including etiquette, content policies and archiving.
13. Queued email that can be routed and forwarded easily the initial response might be a list of keywords and abstracts. With this information you reply with another email with one of the keywords in the body or the subject line. This request triggers the system to send you even more specific information.
14. Natural language-based technology allowing use of natural language questions to query a database.
15. Capability support for intelligent dialogs.
    Provides a context for customer interaction so theur system automatically acquires information about customers' computing environments.
16. Develops a support context by using previous customer contact information stored in the support database.
17. Grammar- or rule-based technologies that can guide customers through an efficient exchange of information.
18. Provides capability for a Web-based interface that allows customers to accurately specify                    (and perhaps diagnose and resolve) problems without needing access to technical support personnel.
19. Smaller download configuration — 5.5 megabytes
20. Enhancements in standards support — HTML 4, Resource Decision Framework, XML, cascading style sheets level 1, document object model and JavaScript 1.5
21. Support for XUL — XML-based User Interface Language toolkit
22. Enhanced navigation features (i.e., My Sidebar and integrated search capabilities)
23. Privacy control through cookie management
24. Customizable user interface via skins (i.e., themes)
25. Enhanced e-mail management, instant messaging and Net2Phone integration
26. Clickstream capabilities:
    The clickstream contains a record for every page request from each visitor to our site.  The clickstream is a record of every gesture each visitor makes. The clickstream will identify successful and unsuccessful sessions on our sites, determine visitors and prospects, and evaluate what parts of our Web sites are effective at attracting and retaining visitors. The clickstream will participate homogeneously and gracefully into the overall distributed DFAS Corporate Computing Environment.

26.1    Date and time of the page request
The date and time of the page request both need to be expressed relative to a single standard time zone such as GMT that does not vary with daylight  savings time. The calendar date needs to be its own dimension, and thus will  have only a few thousand records at most.

26.2    Visitor
The visitor dimension defines three kinds of visitors:

- First, a huge pool of completely anonymous visitors identified only by their IP addresses. The IP address is only of moderate value because it only identifies an outbound port on the visitor's Internet service provider.

- Second, type of visitor is one who has agreed to store a cookie we have provided. This cookie then becomes a reliable identifier for a visitor machine, because we ask to see the cookie on every page request.

- Third level of visitor is the human-identified visitor who not only has accepted our cookie but sometime in the past has revealed their name and other information to DFAS.

26.3    Page object
The software must describe the page by more than its location in the Web server's file system.  The path name to the file is moderately descriptive of the page's content and purpose,  Any given page must be associated with a set of textual attributes that describe and classify the page, regardless of where it is stored in the Web server's file system or how it is generated. The attributes should be drawn from structured lists whose rules the data warehouse team creates, so that the attributes can most usefully drive analysis. The object part of the page object description is more useful as extensible markup language (XML)- as enabled pages become more widely used.  The Web server logs should reveal the page objects' XML tags.

26.4    Request
26.5    Session type
26.6    Session ID (a degenerate dimension tying all the records of a given session together)
26.7    Referrer
26.8    Product/service.

27.  Personalized content syndication for enabling customizable colors, schemes, and other major publishing functions**.**

**15.12.3** **SECTION II: EPET LAB TEST PLAN**

*(Maximum total score is 100 points. This section will count 50% of the Total Technical Evaluation Score.)*

**15.12.3.1** **Ease of Installation (15 points)**
This test rates the systemes as to how easy they are to set up for the various tests in paragraph 2 below (Interoperability).

| Ease of Installation/Configuration | Score |
|---|---|
| Successful installation and proper configuration possible using only screen prompts | 15 |
| Manual instructions required | 11.25 |
| Manual instructions are not sufficient and a call to the vendor's technical support is required | 7.5 |
| Multiple calls to technical support for the same installation and/or configuration problems required | 3.75 |
| Technical support fails to solve the problem and the system cannot be properly installed and/or configured | 0 |

**\*\*Note**: "Technical Support" is defined as standard, commercial telephonic technical support (i.e. help desk) that is available to all users of this equipment. Offerors may not send a representative to the test lab to assist with the equipment or have any contact with the evaluators during this process other than the EPET calling their standard technical support number.

**15.12.3.2 Interoperability (35 points Total)**

**15.12.3.2.1** **Interoperability Point Assignment Approach**
Each system will be assigned points in the following Interoperability test elements according to the following procedure. For each test element (i.e. link aggregation, QOS, etc.), the evaluators will set up a matrix. At the matrix junction for each vendor pair, a score of one (1) will be assigned for positive performance or a score of zero (0) will be assigned for negative performance. At the bottom of the matrix, the total performance score will be calculated for each vendor. This performance score will be converted to points in a prorated fashion based on vendor rankings. Points from each test elements will be added together to determine an overall point score for the Interoperability test portion.

Example:

<div align="center"><b>QoS Interoperability</b></div>

| | Brand W | Brand X | Brand Y | Brand Z |
|---|---|---|---|---|
| **Brand W** | 1 | 1 | 0 | 1 |
| **Brand X** | 1 | 1 | 0 | 0 |
| **Brand Y** | 0 | 0 | 1 | 0 |
| **Brand Z** | 1 | 0 | 0 | 1 |
| **TOTALS** | **3** | **2** | **1** | **2** |

**15.12.4  PAST PERFORMANCE.**  Offerors shall provide five references of contracts for similar type of equipment and services.  The Government will evaluate three to five references.  The Government may also obtain past performance information from sources other than those provided by the Contractor.  For each reference, the Offeror shall include a description of the nature and size of the previous effort, including type of relevant equipment and services provided, and total dollar value of the effort.   Evaluation of past experience/performance will be a subjective assessment based on consideration of all relevant facts and circumstances.  It will not be based on absolute standards of acceptability.  When assessing the quality of an Offeror's past performance, the Government will seek to determine whether the Offeror has consistently demonstrated a concern for customer satisfaction.  This is a matter of judgement.  The following elements will be evaluated and are of equal importance:

> **15.12.4.1  Quality of Supplies/Service**.  Quality of Supplies/Service based on compliance with contract requirements, i.e. that the quality of supplies/service provided was appropriate for the task to be performed and that the service met the overall project goals including cost and end-user satisfaction.

> **15.12.4.2  Timeliness and Performance.**  The Offeror's efforts to meet delivery schedules on time and the methods of tracking and reporting as well as the problems encountered during performance, such as change orders, revisions and the corrective actions taken.

> **15.12.4.3  Contractor Management.**  Offeror's overall management based on their experience with various types of efforts with subcontractors, i.e. partnering, teaming, start-up, the business relationship with customers, customer feedback, controls and availability of personnel.

### 15.12.5  PRICE.

**15.12.5.1  Discount Pricing**.  It is the intent of this BPA to secure discounts on a per order basis as well as on a cumulative basis throughout a given year. Therefore, your proposal may be structured accordingly.  For example, if the Government orders a high volume of E-Mail Management  Systems for a particular purchase it will receive X% discount.  And, in addition, if the total cumulative amount of all orders placed against the BPA exceeds $XXX.XX (the maximum ordering threshold of the GSA contract), the Government will receive an additional discount of X%, regardless of how many Systems are ordered against an individual delivery order.  Vendors may extend the period of constant discount beyond a given year if they choose to do so.

**15.12.5.2  FOB Terms.**  FOB terms shall be in accordance with your GSA Schedule.  For purposes of FOB Origin, use the DFAS-ISO Delivery Address for estimation of Shipping and Handling provided in the Attached SOW, paragraph 5.0.  This address is NOT the same as the EPET Testing Address in paragraph 6 above.

**15.12.5.3  Sample Pricing Proposal Layout**.  Offerors shall clearly designate whether the E-Mail Management  System.  For each configuration proposed, Offerors shall provide a clear break-down of the type of components (including description, item or catalog number, unit price, and quantity) that comprise one (1) E-Mail Management  System.

| ITEM TOTAL | DESCRIPTION | UNIT/QTY | PRICE |
|---|---|---|---|
| CLIN 000X  $XXX.XX | E-Mail Management  System 1 EA | | $XXX.XX |
| CLIN 000XAA | Component Part ABC | X EA | $XXX.XX |
| CLIN 000XAB | Component Part XYZ | X EA | $XXX.XX |
| CLIN 000X  $XXX.XX | E-Mail Management  System 1 EA | | $XXX.XX |
| CLIN 000XAA | Component Part 123 | X EA | $XXX.XX |
| CLIN 000XAB | Component Part 456 | X EA | $XXX.XX |

**15.12.5.4. Offerors are required to identify the specific software product offered, the price and term of usage associated with the software, and the terms and conditions applicable thereto.**

**15.13  BASIS OF AWARD**:  The Government intends to award a single-award Blanket Purchase Agreement (BPA) order (multiple awards will be considered), under FAR Part 8, to the GSA Schedule holder whose proposal will be most advantageous to the Government, price and other factors considered.  The following factors in descending order of importance shall be used to evaluate offers:  Technical, Past Performance, and Price.  Technical is significantly more important than Past Performance.  Technical and Past Performance factors combined are significantly more important than Price.  This is a relative relationship.  Numerical weights are not assigned to Past Performance and Price factors.  The relationship between these factors can be illustrated as follows:  Technical > Past Performance, and Technical + Past Performance > Price.  As Technical and Past Performance ratings become more equal, Price will become more important.

**15.14  PERIOD OF BPA:**  Period of BPA will be five years, or until the expiration of the GSA Schedule, whichever is soonest.

**15.15  MULTIPLE AGREEMENTS:**   The Government reserves the right to issue multiple agreements.  If multiple agreements are not desired, Offerors should so state in their offer.  The Government will not accept multiple quotations.